

**City of Bloomington, Indiana**

**Enterprise Resource Planning  
(ERP)**

**Request for Proposals**

**September 2, 2009**

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# City of Bloomington, Indiana ERP Request for Proposals

## Introduction

The City has issued a Request for Proposals (RFP) for an Enterprise Resource Planning (ERP) System. The RFP seeks software solutions for the following major functions:

- ✓ Financial Management
- ✓ Human Resources Management
- ✓ Utility Billing

Proposers are requested to submit the following as defined within the Packet:

- ✓ Vendor Proposal Checklist (page 18).
- ✓ Detailed information as requested in the Vendor Proposal Section (Page 18 – 26).
- ✓ Proposal Signature Form (page 26).
- ✓ Acknowledgement of intention to meet requirements in Appendix A (Page 28).
- ✓ Any exceptions to information in this packet should be documented in Appendix B (Page 31).
- ✓ A detailed cost summary with breakdowns as defined within Appendix C (Page 33).
- ✓ A completed ERP Functional Checklist spreadsheet (digital format only).

## Intent of this RFP

This Request for Proposal (RFP) is intended to provide vendors with a common, uniform set of instructions to assist them in the development of their proposals and to provide a uniform method for the City to fairly evaluate proposals and subsequently select a vendor to provide the system.

This RFP provides minimum specifications and key features for functional requirements related to organizational objectives, information on applications, number of users, and transaction volumes. Vendors are invited to propose a solution that will effectively and efficiently achieve our goals and objectives and provide for future growth.

In responding to this RFP, vendors should follow the prescribed format and use the included forms, thus providing the City with data that is easily compared with data submitted by other vendors to fairly and objectively evaluate the proposals.

The City assumes no responsibility for conclusions or interpretations derived from technical and background information presented in this RFP, or otherwise distributed or made available during this procurement process. In addition, the City will not be bound by or be responsible for any explanation, interpretation or conclusions of this RFP or any documents provided by the City other than those given in writing by the City through the issuance of addenda. In no event may a vendor rely on any oral statement by the City or its' agents, advisors or consultants. It is the full responsibility of the vendor to thoroughly investigate the needs/requirements of the City not necessarily assumed in this RFP and to propose a fully integrated financial management and human resources system designed and tested to most efficiently meet the needs/requirements of the City.

This RFP is governed by the laws of the State of Indiana.

The City reserves the right to reject any or all proposals, to waive informalities, and to determine the best overall proposal based on evaluation criteria and the best interests of the City of Bloomington.

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## City of Bloomington, Indiana ERP Request for Proposals

### INVITATION FOR PROPOSALS

#### **RFP: Enterprise Resource Planning System**

The City of Bloomington, Indiana, (City) has issued a Request for Proposals (RFP) for an Enterprise Resource Planning (ERP) System. The RFP seeks software solutions for major functions including financial management, human resources management, and utility billing. The RFP and all proposal forms, information, and specifications regarding this proposal are available from the office of the Director of the Information & Technology Services Department. Email contact is preferred at [dietzr@bloomington.in.gov](mailto:dietzr@bloomington.in.gov), subject line: ERP RFP.

All proposals must be submitted to the office of the Director of the Information & Technology Services Department, 401 N. Morton Street, Room 150, Bloomington, Indiana 47404, no later than 5:00 p.m. EST on Sept 18, 2009. Proposals will not be accepted at any other location. All proposals must be submitted in an envelope that is sealed and clearly marked **“RFP: Enterprise Resource Planning System, City of Bloomington”**. The City is not responsible for the premature opening of, or failure to open, a sealed proposal not properly addressed or identified.

The City reserves the right to reject any and all proposals received, and to select the proposal which it determines to be in its best interest. The award of this proposal will be made on the basis of system functionality, technology, cost, support, and vendor characteristics that meet the City's desired needs. The City reserves the right to waive minor discrepancies, omissions, variances, or irregularities in any proposal submitted.

Each Offeror for contracts over \$10,000 must submit their written Affirmative Action Plan to the City AT LEAST TWENTY-FOUR HOURS BEFORE THE BIDDING DEADLINE. Each Offeror must insure that all employees and applicants for employment are not discriminated against because of any race, religion, color, sex, national origin, ancestry, or disability. All the protected classes must be included in the Affirmative Action Plan for it to be acceptable. In addition to other requirements, the plan MUST include a workforce breakdown, an internal grievance procedure, for implementation of the Plan, specific plans for recruitment from minorities, equal access to training programs, a non-retaliation statement, and an explanation of your methods of communicating the operations of the Affirmative Action Plan to employees and prospective recruits.

Each Offeror should submit copies of the plan SEPARATELY from the proposal. The Contract Compliance Officer for the City of Bloomington is Barbara McKinney. EACH BIDDER MUST REVIEW HIS OR HER AFFIRMATIVE ACTION PLAN WITH MS. MCKINNEY WELL IN ADVANCE OF THE BIDDING DEADLINE. Her telephone number is (812) 349-3429. Her office hours are from 8:00 a.m. to 5:00 p.m. Monday through Friday. EACH OFFEROR'S WORKFORCE BREAKDOWN FIGURES MUST BE UPDATED EVERY SIX MONTHS.

OFFERORS WHO FAIL TO SUBMIT ACCEPTABLE PLANS  
ARE SUBJECT TO DISQUALIFICATION.

## City of Bloomington, Indiana ERP Request for Proposals

### GENERAL INSTRUCTIONS TO PROPOSERS

#### A. KEY DATES

Sealed proposals will be accepted until 5pm EST at Information & Technology Services Department Director's Office, 401 N. Morton St. Room 150, Bloomington, Indiana 47404 on Sept 18, 2009. Proposals cannot be accepted at any other location.

Milestone	Timeframe
RFP Issuance	Sept 2, 2009
Vendor Questions Due	Sept 9, 2009
Answers Published	Sept 11, 2009
Vendor proposals Due	Sept 18, 2009 by 5p.m. EST
Notification of Demonstration Dates	Prior to or on Sept 25 <sup>th</sup>
Demonstrations of Software	Weeks of Sept 21 <sup>st</sup> and Sept 27 <sup>th</sup>
Selection of Vendor	Week of Sept 27 <sup>th</sup>
Contract Negotiations	Begins week of Sept 27 <sup>th</sup>

#### B. CALCULATION ERROR (S)

In the event of a calculation error on the proposal form, unit price shall prevail.

#### C. QUESTIONS AND ADDENDA

The City's ITS Director will act as Purchasing Agent offering this proposal. All parties submitting proposals shall carefully examine this RFP and any addenda issued by the Purchasing Agent. Proposers shall seek clarification of any ambiguity, conflict, omission, or other error in this proposal in writing. Oral comments or communications do not form any part of this proposal offering. Questions should be addressed to the Purchasing Agent in writing. Written communications should be addressed as follows, email preferred:

[dietzr@bloomington.in.gov](mailto:dietzr@bloomington.in.gov)

Subject Line: ERP RFP Questions

or

Rick Dietz, ITS Director  
City of Bloomington  
PO Box 100  
Bloomington, Indiana 47402

If the answer materially affects this procurement, the information will be issued in an addendum. The RFP, any Addenda, all questions and answers, and any other relevant documents will be posted on the City's website at <http://bloomington.in.gov/rfp>. It will be the responsibility of prospective vendors to review this material prior to the submission deadline.

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### D. PRE-PROPOSAL CONFERENCE and INSPECTION OF FACILITIES

To enable prospective Proposers to gain insight to a proposal offering, a pre-proposal conference or teleconference may be scheduled upon vendor request.

### E. BASIS OF PROPOSAL AWARD

The City of Bloomington, Indiana has selected to award this proposal offering on the basis of system functionality, technology, cost, support, and vendor characteristics.

### F. INSPECTION OF PROPOSER'S PLANT AND PLACE OF BUSINESS

The City of Bloomington, Indiana reserves the right to inspect the proposer's facilities and place of business of any proposer participating in this proposal offering.

### G. RETENTION OF RECORDS

The successful proposer shall be required to maintain, for a period of five (5) years from the date of final payment to the proposer, all books and records pertaining to its proposal.

### I. CONFLICTS, GRATUITIES, AND KICKBACKS PROHIBITED

The City of Bloomington, Indiana prohibits any actual or appearance of conflicts of interests, gratuities, kickbacks, and use of confidential information in all proposal offerings.

### J. SUPPORTING DOCUMENTATION

Proposers are encouraged to submit with their proposal any literature, warranty information, and other documentation to support the proposer's compliance with the specifications contained in this proposal package.

### K. PRICING ELIGIBILITY AND PROPOSAL RETRACTION

All Vendor proposals are required to be offered for a term not less than 90 calendar days in duration. A proposal may not be modified, withdrawn or cancelled by vendor during the 90 day time period following the time and date designated for the receipt of proposals.

### L. RIGHT TO REJECT AND AWARD PROPOSAL

The City of Bloomington, Indiana reserves the right to reject any and all proposals received in response to this proposal offering, and to waive any informality in this proposal offering. The award of a contract shall be at the sole discretion of the City of Bloomington, Indiana. The award will be made to the responsible proposer whose proposal is determined to be the most advantageous to the City, taking into consideration the evaluation factors set forth in this proposal package. The City of Bloomington may make the award with or without further discussion of the Proposals submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the proposer can propose with respect to price, product, service, and technical capability. The contents of the proposal of the selected proposer will become the basis for the City of Bloomington, Indiana's contractual obligation when the award is made.

### M. PROPOSAL IDENTIFICATION

Proposers must submit their proposal in an envelope clearly marked **"RFP: Enterprise Resource Planning System, City of Bloomington"**. This instruction is provided as a means to ensure proper delivery, handling, and public announcement of a proposer's response at the official proposal opening date, and time. Proposals in the form of telegrams, telephone calls, facsimiles, or electronic messages will not be accepted.

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### N. PROPOSAL SUBMISSION

Prior to entering into a contract with Bloomington, the successful proposer(s) must provide the following information:

1. The name of every company bearing an interest in the proposed goods and services to be provided in this proposal offering.
2. The name, title, address, and telephone number of individuals with authority to contractually bind the proposer; and,
3. A designated person(s) who can be contacted by the City of Bloomington, Indiana during the proposal evaluation period. This information shall include the person's name, title, address, telephone number, FAX number, and Internet E-mail address if available.

### O. NUMBER OF PROPOSAL SUBMISSIONS.

Vendors will be required to submit seven (7) printed copies and one electronic copy of all proposals to the City for review.

### P. PRESENTATIONS AND DEMONSTRATIONS

Demonstrations will be required of proposal finalists as part of the evaluation process. The City of Bloomington, Indiana will notify one or more of the responsive proposers to make arrangements for the date, time, and place for such a presentation or demonstration. Demonstrations are being planned to occur during the weeks of Sept 21<sup>st</sup> and Sept 27<sup>th</sup> (See page 4, section A "Key Dates").

### Q. DISCLOSURE

Trade secrets as that term is defined in Indiana law submitted by a proposer in connection with this procurement shall not be subject to public disclosure. However, the proposer must invoke this protection prior to or upon submission of the data or other material, and must identify the specific area or scope of data or other materials to be protected and state the reasons why protection is necessary. An all-inclusive statement that the entire proposal is proprietary is unacceptable. A statement that costs are to be protected is also unacceptable. Disputes over disclosure will be resolved by staff based on legal advice provided by the City of Bloomington, Indiana's Legal Department

### R. COST INCURRED IN RESPONDING

This proposal offering does not commit the City of Bloomington, Indiana to pay any costs incurred in the preparation and submission of proposals or in making necessary studies or designs, nor does it commit the City of Bloomington, Indiana to enter into a contract.

### S. PRIME PROPOSER RESPONSIBILITIES

If the proposer's response includes goods and services provided by others, the proposer will be required to act as the prime contractor for all such items and must assume full responsibility for the procurement, delivery, and quality of such goods and services. The proposer will be considered the sole point of contact with regard to all stipulations, including payment of all charges and the meeting of all contractual requirements resulting from this proposal offering.

### T. PROPOSALS PROPERTY OF THE CITY

All proposals submitted in response to this RFP become the property of the City once they are opened. Supporting technical manuals will be returned at the written request of the proposer. All submitted proposals and supporting material are a matter of public record.

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### U. CONTENT OF PROPOSAL

Any addenda to these documents shall be sent to vendors and will become part of this RFP and the contract. No oral statements, explanations, or commitments by anyone shall be of any effect unless incorporated into the addenda. All questions will be collected and responses distributed as follows:

- Questions received from vendors through end of day Sept 9<sup>th</sup> will be answered by end of business day on Sept 11, 2009. Responses will be sent to all proposers via email and all questions and responses will be posted on the City's website at <http://bloomington.in.gov/rfp>.

All vendor questions should be addressed to Rick Dietz at [dietzr@bloomington.in.gov](mailto:dietzr@bloomington.in.gov) using the subject line: ERP RFP Questions.

No RFP responses to questions will be posted after 5:00 p.m. EST on Sept 11, 2009.

### V. INSURANCE REQUIREMENTS

Prior to entering into a contract with the City of Bloomington, the successful proposer(s) must provide a Certificate of Insurance showing proof of insurance, which meets or exceeds requirements set forth in Appendix A.



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### CURRENT SYSTEMS BACKGROUND

The City of Bloomington currently uses Oracle Financials as its financial management system, a custom-developed applications for utility billing, a has no human resources management system. The following shows an **estimated** summary of key transaction and operating volumes.

Transaction and Operating Volumes	Current
<b>Organization</b>	
City of Bloomington population	70,000
City of Bloomington 2009 adopted expenditure budget	\$31.2 million
City of Bloomington 2008 adopted expenditure budget	\$29.5 million
Total number of city locations	2 (Cityhall, Utilities Service Center)
Number of concurrent financial and human resource system users	75
Number of concurrent utility billing system users	10
Desktop Hardware	Hewlett Packard, Dell
Desktop Operating System	XP, MacOSX 10.5.x, Linux
E-mail System	Scalix
Internet Browser	IE7, Firefox 3, Safari 4
<b>Current Technology Environment</b> <b><i>** It is anticipated that the City of Bloomington will purchase new hardware for this system.</i></b> <i>The following specifications are for current servers. **</i>	
Financial System	Oracle Financials
• Server Hardware	Dell PowerEdge 2950
• Server Operating System	Redhat Linux
• Software Database Platform	Oracle DB
Utility Billing	CUBS (Custom software)
• Server Hardware	IBM X Series 345
• Server Operating System	Redhat Linux
• Software Database Platform	Oracle DB
Human Resources	None
• Server Hardware	N/A
• Server Operating System	N/A
• Software Database Platform	DB2

<b>General Ledger</b>	
Fiscal year starts	January 1
Number of funds	70
Number of departments	24
<b>Project / Grant Accounting</b>	
Number of projects	50-100
Number of grant accounts	50
<b>Fixed Assets</b>	
Number of fixed assets	40-50,000
<b>Purchasing and Purchase Orders</b>	
Number of regular purchase orders (monthly)	700
Number of purchasing/AP vendors	4,000

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<b>Accounts Payable</b>	
Number of accounts payable checks (monthly)	500
Frequency of accounts payable check runs	Bi-weekly
<b>Accounts Receivable &amp; Miscellaneous Billing</b>	
Number of Accounts Receivable statements mailed (monthly)	30,000
Number of transactions (monthly)	1500
<b>Human Resources and Payroll</b>	
Number of full-time employees	700
Number of part-time, seasonal, temporary employees	50-250(Summer)
Number of bargaining units	3
Normal payroll frequency	Bi-weekly
Pension payroll frequency	Monthly
<b>Utility Billing</b>	
Number of customers	24000
Types of utilities billed	Water, sewer, storm water

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### REQUIREMENTS

The City is seeking to purchase the following software solutions:

- ✓ Financial System
- ✓ Human Resources Management System
- ✓ Utility Billing System

The proposal should provide a breakdown of the financial system and utility billing system separately. However, the City of Bloomington prefers a solution that includes seamless integration between the financial system, utility billing system, and other desired subcomponents such as payroll, human resources, grants management, etc. However, the City reserves the right to purchase each solution separately from different vendors if it is considered to be within its best interest. The City – as part of this migration – is willing and desired to reengineer its internal processes where doing so will increase the overall efficiency and effectiveness of our operations.

The selected Vendor for each solution must be our one point of contact for all hardware, software, installation, implementation, conversion, training, and project management relating to each solution being proposed.

Proposals must include a description of each software module including developer information, licensing options, description of integration with other proposed applications, and a summary of features. If the module does not meet the City's requirements, the proposer must state the costs and schedule to update the module to meet the City's specifications. The total costs of modifying the module must be fully itemized on the proposal Form included in this RFP.

#### System and Hardware Requirements

A proposer must outline within its proposal the system and hardware requirements of each software solution being proposed. The City of Bloomington intends to purchase any needed hardware and equipment separately from this proposal. Preferred system and hardware specifications include:

- Supports MySQL and/or MS SQL Server database
- Web-based System management and end user UI compatible with modern Webkit-based browsers
- Manageable and customizable by internal staff
- Compatible with a VMware / Linux / SAN environment
- Standards compatible backup strategy

#### Financial System Requirements

The Financial System solution should include at a minimum:

- General Ledger
- Accounts Payable
- Accounts Receivable
- Revenue and Cash Receipting
- Purchasing and PO's
- Requisitions
- Contract Management

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- Fixed Assets
- Project Accounting
- Grant Management
- Job Cost Accounting (Activity based and/or performance measurement)
- GASB Reporting (GASB 34 conversion capabilities)
- Multi-year Budget Preparation and Management (minimum of five years)
- Ad Hoc Reporting
- Payroll and Benefits Management
  - Payroll Processing with setup options for a minimum of five bargaining units
  - Employee Self-Service Benefits Enrollments and Updates
  - Retiree Insurance Management
  - Worker's Compensation
  - Benefits Administration / Management with setup options for a minimum of five bargaining units
- Human Resource Management Including:
  - Recruiting / Selection
  - Performance Reviews
  - Training Administration
  - Employee Development
  - Employee Self-Service for Life Event Changes
  - Health and Safety
  - Employee Discipline
  - Employee Self-Service for Time and Attendance
  - Employee Self-Service for Benefits Selection
  - Employee Equipment Assignment
  - Workers Comp Administration

Proposed application software must, at a minimum, be capable of meeting the mandatory application software requirements indicated within this RFP. The City will, however, entertain proposals that will improve our processes based on vendor expertise and recommendations.

### Utility Billing Solution

The utility billing solution should include at a minimum:

- Water meter inventory tracking
- Ability to bill locations with multiple meters and deduct meters
- Work order tracking / history
- Allow for multiple customers per a service address
- Ad Hoc Reporting
- Bill reprint on demand (at least 2 years back)
- Interface with Neptune meter reading software (Equinox)
- Residential and Commercial Customer Self-Service for view, pay, and changes (web-based)
- Multi-site consolidated billing
- Ability to interface and/ or integrate with a financial system solution
- Inventory tracking
- Support for in-house and outsourced bill printing

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Proposals should follow directions in Appendix C to provide a detail cost proposal. Functionality requirements listed above should be addressed within the proposal submitted.

Proposals must include a description of each software module including developer information, licensing options, description of integration with other proposed applications, and a summary of features. If the module does not meet the City's requirements, the proposer must state the costs and schedule to update the module to meet the City's specifications. The total costs of modifying the module must be fully itemized and included in the proposal on the detail cost sheet discussed in Appendix C.

Items not included in a vendor's proposal must be clearly indicated (See form in Appendix B).

### Data Conversion

The City is requesting the selected vendor to perform data conversion from the current system to the new system as specified below:

### Financial System

- All active human resource / payroll records
- All financial / payroll / human resource record data.
- Some spreadsheets may need to be converted although most data should reside in current system

### Utility Billing System

- All information on active utility accounts
- Billing history on all active and inactive accounts
- Meter reading history on all active service addresses
- All information on inactive accounts

### Human Resources and more

- All desired information currently held in spreadsheets by Employee Services department, Controllers' office or other departments. This Data includes but is not limited to
  - Retiree Contribution payments
  - Employee Contributions by pay period
  - Employees insurance information, voluntary products, job title and salaries.
  - Previous employees by date of termination
  - Job postings for the year
  - Performance evaluation scores for each year
  - Benefit time employees carry over from one year to another.
  - Job applicants by which position they apply for
  - Funds from payroll to HIT account on a bi-weekly basis
  - Utilities employees deductions for medical/dental on a bi-weekly basis.
  - Civil city employees deductions for medical /dental on a bi-weekly basis
  - Report used to calculate premiums due for basic life premiums to AUL
  - List of all employees who are eligible for basic life
  - Track staff benefit time
  - Departmental PTO and Time data
- PC Compliance Training Management System data

Vendor is to perform data conversion. The vendor must indicate in the proposal the total cost to perform the data conversion services and a detailed description of the conversion services.

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Mutually agreed specifications for the conversion services and testing procedures will be included in the negotiated contract.

### *Anticipated Number of Users*

The City anticipates having two sets of users: concurrent and named. Concurrent users are those who utilize the system and will be completing a few to many transactions daily. Named users are users who have access to the system and utilize it actively. The number of both types of users varies depending on the system and accounting cycle. Usage under a new ERP is anticipated to be higher in each category.

System	Concurrent Users	Named Users
Financial System	75	25
Utility Billing System	10 *	20**

\* The City has approximately 70,000 residents who may need self-service features depending on the features and modules proposed.

\*\* The Utility Department has 24,000 utility customers who will need access to self-service features.

The majority of usage occurs between 8:00 a.m. and 6:00 p.m., Monday through Friday. There will, however, be times throughout the year when weekend and evening access is required. The vendor should specifically indicate if there are times when the system cannot be accessed.

### *Maintenance and Support*

The City places a high degree of importance on the maintenance and support a vendor provides for its application software packages. The quality and cost of maintenance and support offered by a vendor will be an evaluation criterion.

The maintenance agreements for each application software package will begin immediately upon the expiration of the warranties for that package; otherwise these agreements will begin immediately upon acceptance of the package.

The selected Vendor must be willing to bear responsibility for any defects in the software that prevent the software from performing as designed including any consequential damage to data including erroneous, inaccurate, and unreliable data that is created by the software defect at no additional cost to the City.

Technical support must be available 24/7.

The Vendor must describe the company's policy on maintenance and support, including costs, specifically addressing the following:

- how regular support is provided
- how after-hours support is provided
- how software defects are handled
- how and when software upgrades, minor and major, are provided
- modifications required as a result of mandated state/federal requirements
- modifications required as a result of changes in tax rates
- custom modifications desired by the City

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### ***Software Licensing / Maintenance***

The vendor must agree to license the software for continuous use at a fixed fee without additional royalties or services fees, except for fees for ongoing software maintenance. Software enhancements or upgrades for the base system, as well as any additional modules purchased by City of Bloomington will be provided at no extra charges beyond the annual software maintenance fee for as long as the City has a valid software maintenance agreement with the vendor. The vendor shall take full responsibility for software maintenance including upgrades, improvements, additions, enhancements, and changes in every respect.

### ***Operations and Users Documentation***

The vendor must furnish a complete description of the user manuals that will be provided for the operation and use of the proposed system. Describe the format in which the documentation will be provided: on-line, compact disk, hard copy, or a combination. A sample of the accounts payable operations manual must be included with this proposal.

### ***Implementation Plan***

A projected, detailed implementation plan must be included in the vendor's proposal including milestone dates and events based on the City's plans to begin implementation within 30 days or less of contract signing. The City will favor a realistic and aggressive implementation plan. All software or hardware must be loaded and configured on-site at City of Bloomington. It is the City's goal to have financials deployed in the first-to-second quarter of 2010 with utility billing following.

Vendor will provide on-site support, as needed, during the implementation of the project. If the City of Bloomington is to pay for travel, lodging, etc, during the implementation or maintenance periods, it must be included in the proposal price list. The City of Bloomington shall not be responsible for additional charges or costs not included in this proposal.

The City reserves the right to approve the implementation plan of the selected proposal, which will be included in the contract.

### ***Project Management and Process Definition***

The selected Vendor(s) is (are) expected to assign a project manager. In the proposal, explain the company's policy regarding project management and provide the qualifications of the proposed project manager. Any additional costs associated with project management services must be itemized and included in the proposal.

As part of the implementation the City intends to redesign its key processes. In the proposal, explain and quantify the company's inclusion of this process definition in its process, and provide the qualifications of the proposed process facilitator(s). Any additional costs associated with process facilitation and definition services must be itemized and included in the proposal.

The City reserves the right to approve the selection of the project manager and project management services. Therefore, project management services are subject to negotiation after the selection of a vendor. Final agreements regarding project management services shall be included in the contract for service. The City may seek the replacement of a project manager if it's expectations aren't met.

### ***Training***

The Vendor must provide on-site training services by a qualified trainer(s) for three different levels of users. On one level, training must be comprehensive and suitable for our System Administrators. On the second level, training must be informative and suitable for our finance, human resources, & utility billing

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users. The third level of user will be the departmental user. All training shall use Bloomington, Indiana actual data for ease of training various users.

The Vendor is required to include a clearly defined training plan in the proposal, including costs, which will provide a sufficient amount of training in order for the trainees to perform the primary functions of the system unassisted. The training plan must provide a statement of training objectives for each application stating what subjects are to be covered, what the trainees are expected to be able to do at the end of the session, and the amount of training time that will be provided for each application. The training plan will be subject to approval by the City. On-site training will take place at the Bloomington City Hall building in Bloomington, Indiana. Employee training must be provided in a hands-on, classroom environment provided by the city. The ITS training room will accommodate up to 10 users. The City will provide the computers for training. The vendor is responsible to work with City Information & Technology Department staff to ensure the training computers are set up properly.

### ***References***

The City prefers vendors whose expertise, experience and knowledge is based on government practices and procedures and who specialize in governmental financial systems. Therefore, one of our core requirements is the Vendor's proposed software must be currently operating in a production environment for a city government. The vendor must supply a list of all governmental entities, which are currently using its financial/human resources and utility billing systems within the State of Indiana or neighboring states. Contact information should include contact name, telephone number and email. Please indicate if any of these entities are supported by third party vendors.

The vendor shall also provide information on the two (2) most recently completed and installed modules as well as at least two (2) entities that have been in operation for a minimum of three (3) years. With this list, provide the name and demographic information of the governmental entity (Operating Budget, Total General Fund Budget, Total CIP budget, Number of Employees, Number of System Users), reference names, addresses, phone and email contacts, major release number, purchase date, installation date, planned production date and actual production date.

City of Bloomington personnel reserve the right to contact any individuals listed in this section as references.

### ***Taxes***

Taxes should not be included in the proposal quotations for any software. Any sales tax items should be listed as a separate item at time of invoicing. The City of Bloomington is a tax-exempt entity, and Certificates of Exemption will be provided to the successful proposer upon request.

### ***Exceptions to the RFP***

The Vendor must itemize all exceptions to the specifications included in this RFP on the Exception Form (APPENDIX B), referencing the section by number to which exception is taken. Any RFP sections to which the Vendor does not take exception will be considered as being agreed upon by the Vendor.

### ***Disqualification of Vendors***

The City will consider no more than one proposal per individual, a firm or partnership, a corporation, or an association under the same or different names. If the City determines that there is reason to believe that collusion exists among the Vendors, any or all proposals shall be rejected, and all participants in such collusion shall be excluded from consideration for future proposals for the same work. No contract shall be awarded except to competent vendors capable of performing the class of work contemplated.



## City of Bloomington, Indiana ERP Request for Proposals

### VENDOR PROPOSAL CHECKLIST

Please use the following proposal checklist to ensure you are submitting a complete proposal. In addition to the five hard copies please clearly identify all CD-ROMs with your business name and address. Please indicate where the information is located within your proposal submission and ensure that your proposal numbering corresponds to the numbering scheme below. Place this check list in the table of contents of your proposal.

This is a rudimentary checklist. As part of the City's RFP package the City has provided a comprehensive functional checklist in spreadsheet form. This checklist is further discussed in Appendix D.

RFP Item	Indicate "included" or "not included"	Proposal Section
A. Proposal Summary		
B. Company Background		
C. Software Modules : (Includes details and costs)		
Financial System		
Utility Billing System		
Human Resources Management System		
D. Hardware / Equipment, Operating System, Programming details and costs		
E. Implementation Plan, Staffing Plan, Timeline, including:		
Project Management – details and costs		
System and Operational Procedure Development Plan		
Software Installation Plan		
Data Conversion Plan		
Report Development Plan		
Integration and Interfaces		
Training and Documentation Plan		
Process Facilitation / Redesign		
F. Documentation Sample		
G. Staffing Plan		
H. Ongoing Support and Maintenance – details and costs		
I. Software Updates and Distribution – details		
J. System Performance and Recovery– details		
K. References		

## City of Bloomington, Indiana ERP Request for Proposals

M. Proposal Signature		
Appendix A: Proof of Insurance		
Appendix A: Performance Bond Letter		
Appendix B: Exceptions		
Appendix C: Total Cost Summary		
Appendix D: Comprehensive Functional Checklist*		

- **Please note that the Functional checklist spreadsheet should not be submitted in print form. We request only a digital submission.**

## City of Bloomington, Indiana ERP Request for Proposals

### VENDOR PROPOSAL

Please include the following in your proposal:

#### A. Proposal Summary Form

Name of Company	
Software Brand Name	
Name of Preparer	
Name of Primary Contact for Follow-Up Questions	
Contact Phone Number	
Fax Number	
E-mail Address	

#### B. Company Background

Vendors must provide information about their company so that the City of Bloomington can evaluate the Vendor's stability and ability to support the commitments set forth in response to the RFP. The City of Bloomington, at its option, may require the Vendor to provide additional documentation to support and/or clarify requested information. The Vendor should outline the company's background including a brief description (e.g., past history, present status, future plans, company size, etc.). The Vendor should also submit (attach) audited financial information for the past two (2) completed fiscal years, which includes income statements, balance sheets, and statement of cash flows.

1.	Please state the year the Vendor started in the business of selling ERP system solutions.	
2.	Where is the Vendor's closest facility/sales office in reference to Bloomington, Indiana?	
3.	Where is the Vendor company's headquarters?	
4.	Please list the Vendor's sales in the previous four years:	2009- 2008- 2007- 2006-
5.	How many total employees does the vendor have in each of the following categories:	Sales/Marketing- Management/Administration- Help Desk Staff- Development Staff- Implementation Staff- Other- Total-

## City of Bloomington, Indiana ERP Request for Proposals

6.	Specify the number of public sector vs. private sector clients.	
7.	Indicate whether the business is a parent or subsidiary in a group of companies.	
8.	Has this company or product being proposed ever been purchased or acquired by another company? If yes, provide the name of the companies involved, specific products affected and when such merger or acquisition(s) took place.	
9.	What percentage of revenues does this offered system represent to your company verses other products/ services?	
10.	Indicate if the company incurred an annual operating loss in the last 5 years.	
11.	Has the company had a workforce reduction during the past 5 years?	
12.	What is the percentage of annual revenues reinvested into research & development?	
13.	During the weeks of Sept 21 <sup>st</sup> and Sept 27 <sup>th</sup> can the vendor commit to being available for an on-site demonstration, one day max?	

### **C. Software Modules – details and costs (complete a separate checklist for each part a bid is being submitted for - Financial System & Utility Billing).**

The Vendor is required to provide a general description of the application program product and how it will meet requirements of this RFP. Describe opportunities for making local customizations or development of interfaces without compromising the integrity of the base system. Also include in this description the following: wireless capabilities and support for mobile devices, GIS integration and capabilities, and web based e-Gov solutions (including what is available for employee access, vendor access, citizen access and credit card processing).

14.	Please explain how your product is licensed. (concurrent, site, user or machine based) How are additional license sold?	
15.	How long has the current version of the Vendor software been in production?	
16.	What is the system architecture? (web-based, client/server, mixed)	

## City of Bloomington, Indiana ERP Request for Proposals

17.	What is the query tool and report writer that the vendor is proposing?	
18.	Please describe any workflow or event alerts and notification capabilities the application provides.	
19.	Does the system provide global query function so that users can search system wide based on name, account, range of values, or partial & wild-cards?	
20.	Please describe all 3 <sup>rd</sup> party software required or recommended for the solution, including report writers	
21.	Does the system provide multiple levels of data security control access by terminal, transaction and file?	
22.	Is the system compatible with Microsoft Office Suite permitting the ability to import and export data to budgets and journal entries?	

### **D. Hardware, Operating System and Programming (complete a separate checklist for each part a bid is being submitted for - Financial System, Utility Billing, and Human Resources).**

The Vendor is required to provide the following information. Please include the minimum requirements for the computer hardware environments in which the proposed software will run (server & workstation). This should include the supported operating system(s) and database system(s) as well. Identify the communication protocols and networking requirements that are required for implementation and operation of the proposed system. Identify the development tools and methodology used by the Vendor in designing, developing, maintaining, and enhancing the application system. If specific CASE or Object Oriented tools are used, provide the name, version, and Vendor name providing the tools.

23.	What hardware platform(s) does the vendor proposed application software currently operate on?	
24.	What operating system(s) does the vendor proposed application software currently operate on?	
25.	What database environments does the vendor proposed application software currently operate on?	
26.	Is the vendor committed to supporting the above operating system, database & hardware platforms for the foreseeable future?	
27.	Is the proposed application developed with a widely accepted development environment such as Java? Please list all development languages utilized, including any proprietary toolsets.	

## City of Bloomington, Indiana ERP Request for Proposals

28.	Does the system architecture support a multi-tier deployment?	
29.	Does the application support native browser based deployment for workstations? Which web servers and browsers are supported? (Apache, Firefox, etc)	
30.	Does the system support deployment using remote access tools. Are there any issues related to this type of utilization?	
31.	Does the system support Intranet/WAN deployments with low communications bandwidth requirements?	
32.	Does the system support the use of a Storage Area Network (SAN)?	
33.	Can the system be operated under a VMware environment?	

### **E. Implementation Plan (complete a separate checklist for each part a bid is being submitted for - Financial System, Utility Billing, and Human Resources).**

The Vendor is to provide an implementation plan in narrative form that details how the proposed solution is to be implemented. This implementation plan should include the following elements:

- i.) Project Management Approach
- ii.) System and Operational Procedure Development
- iii.) Software Installation
- iv.) Data Conversion Plan
- v.) Report Development
- vi.) Integrations and Interfaces
- vii.) Training
- viii.) Documentation Development
- ix.) Process Redesign Involvement
- x.) Estimated Timeline

The Vendor should not be constrained to only include the above items in the Vendor's proposal response if the Vendor feels that they add value to the overall implementation.

34.	How many fully operational installations has the vendor completed?	Local Gov. – County Gov. – State Gov. -  Other – Total –
35.	What is the hourly rate for implementation assistance beyond that which is included in the vendor proposal by skill-set?	

## City of Bloomington, Indiana ERP Request for Proposals

It is expected that the Vendor will lead the efforts in each of the implementation areas described below unless stated otherwise. Further details on what is to be provided as part of the Vendors proposed implementation plan are included in the following subsections.

### Project Management Approach

Provide an overall description of the Vendor project management approach towards this type of engagement.

### System and Operational Procedure Development

The Vendor is expected to work with the City of Bloomington in developing technical support and technical operational procedures to support the system.

### Software Installation

The Vendor is expected to specify, furnish, deliver, install and support all system software.

### Data Conversion Plan

The Vendor is expected to perform electronic and manual data to the new system, including overall data conversion coordination, definition of file layouts, and data import and validation into the new system. It is expected that all financials, human resources and utility billing data from the previous systems will be converted to the new system -- from approximately 2001 to date -- including, but not limited to:

- a) General Ledger
- b) Accounts Payable/Purchasing (POs & Vouchers).
- c) Vendor file
- d) Budget
- e) Grants
- f) Miscellaneous Billing/Account Receivable/Collections
- g) Payroll
- h) Human Resources – personnel data, applicant tracking information, position data, benefit data/medical insurance/COBRA, training data, etc.
- i) Utility Billing System – All active account information.
- j) Utility Billing System – Billing and meter reading history on all accounts.
- k) Time sheet records

36.	What practices and processes are in place to maintain the security of data undergoing conversion?	
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### Report Development

It is expected that the system will provide the ability for end-user querying and reporting to be performed without impacting the performance of the transactional system. It is also expected that the system will provide the ability to upload and download information ensuring integrity of uploaded information. The Vendor is expected to provide assistance to the City of Bloomington staff in the development of needed reports, via technical training on the tools used for report development, database schema and architecture, etc.

### Integrations and Interfaces

## City of Bloomington, Indiana ERP Request for Proposals

It is expected that information would be entered once into the system. Modules within the system should be integrated in real-time with each other such that batch processes are not required to transfer information from one area of the system to another unless that is the preference of the municipality. The Vendor is expected to assist the City of Bloomington in the development of required integrations and interfaces. Planned interfaces include:

- a) Ability to import inventory and transaction information from Vermont Systems RecTrac, GolfTrac & WebTrac products.
- b) Ability to import transaction information from T2 Flex.
- c) Ability to interface with ESRI products ARCGIS Desktop and ARC GIS Server (Land Management Module).
- d) Ability to import merchant transactions to Utility Billing, Accounts Receivable and General Ledger systems related to automatic credit card payment services.
- e) Generic GL and Cash interfaces for uploads and wire transfers.
- f) Ability to import/export data from Payroll module and bank to accommodate positive pay and direct deposit services.
- g) Ability to import files for bank reconciliation.
- h) Ability to export and format Payroll data for PERF.
- i) Ability to generate W-2 files for State and Federal government.
- j) Ability to upload information from Excel spreadsheets into the appropriate budgeting, HR and Payroll, and General Ledger modules.
- k) Ability to import data from meter reading handheld devices

The Vendor should respond in this section with a discussion on the approach on how each of these integrations would be developed. Aggregate pricing for the development of all of the interfaces should be included in the Pricing forms.

### Documentation Development

It is desired to have the selected Vendor take the lead on development of end-user and technical training material. The Vendor is expected to provide user manuals in digital format for use by the City of Bloomington as part of the initial training and on-going operational support.

### Process Redesign Involvement

The City of Bloomington intends to redesign business processes as part of the system implementation. The Vendor is expected to participate in process redesign sessions although the municipality will be responsible for leading these sessions and implementing the redesigned processes.

### Estimated Timeline

Please provide an estimated timeline of implementation that the vendor could commit to which would fully encompass the scope of the project. Please use an estimated start date of Oct 1, 2009

#### F. Documentation

During the evaluation period, the Vendor will provide one set of sample technical training documentation and end-user documentation – an Accounts Payable module - to the City of Bloomington. If requested, at the end of the evaluation, the documentation will be returned to the Vendor.

#### G. Staffing Plan (complete a separate checklist for each part a bid is being submitted for - Financial System & Utility Billing).



## City of Bloomington, Indiana ERP Request for Proposals

The Vendor must detail the type and amount of implementation support to be provided (e.g., number of personnel, level of personnel, time commitment, etc.). An overall estimated staffing plan for the project including identification of the City of Bloomington resources during the course of the implementation in terms of hours or full-time equivalents may also be included.

### **H. On-Going Support and Maintenance (complete a separate checklist for each part a bid is being submitted for - Financial System & Utility Billing).**

The Vendor must specify the nature, costs and conditions of any post-implementation support options including:

- i.) On-site support
- ii.) Telephone support - Include the minimum response time provided as part of the basic support agreement and average response time for the past twelve (12) months.
- iii.) Hardware and database
- iv.) Availability of user groups
- v.) Escalation options and procedures

Identify the party or business unit that is responsible for the support options provided above. Additionally, it is requested that the Vendor submit their Help Desk “prioritization” of support calls and their call “escalation procedures.”

37.	Does the vendor have a toll-free support line?	
38.	Does the vendor have a User Group for Indiana?	
39.	Does the vendor have an Annual User Conference?	
40.	What is the vendor’s average response time (hours) for a telephone response to a service call?	
41.	What is the vendor’s guaranteed maximum response time (hours)?	

### **I. Software Updates & Distribution**

Provide information on how server and client side software updates are received, processed and distributed to either the server and/or client environment. Describe the delivery method of future updates and product enhancements, the frequency of upgrades and if an accumulative patch process is an option. Also, describe how updates are incorporated with local custom modifications such that custom modifications will not be lost when a new release of the software is applied. Describe any configuration management system that is incorporated with the Vendor solution. The City of Bloomington expects to receive maintenance, as well as functional and technological enhancements as part of their Annual Support Agreement.

42.	Will the vendor provide all periodic enhancements to the software at no additional charge, beyond the annual support agreement?	
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## City of Bloomington, Indiana ERP Request for Proposals

43.	Does the vendor provide product upgrades automatically or on demand? What is the release cycle?	
44.	How does the vendor normally release product upgrades or enhancements?	
45.	How does your system handle updates of federal, state and local income and sales taxes?	
46.	Does the vendor operate a beta program involving customers in design and testing of system or component modules? If so may the City participate in this program?	
47.	Does the vendor place it's software in escrow for release to customers in the event the business should fail?	

### **J. System Performance & Recovery**

System response time must not impede the ability for departmental staff to perform their required job functions using the system. Describe system performance of the proposed solution. Please state whether the vendor will make this commitment and what restrictions will apply. Availability and recovery in the event of failure is an extremely important part of this software solution. Please describe options for clustering and load balancing. Please state any additional fees required for an off-site redundant system.

### **K. Vendor Reference Information**

Provide a contact person and phone number of three (3) recent clients that are similar to the City of Bloomington. Please indicate how long they have been a client and which systems they are using.

Client Name:  
Contact Name:  
Contact Phone Number:  
Been a Client Since:  
Modules that are live:

Client Name:  
Contact Name:  
Contact Phone Number:  
Been a Client Since:  
Modules that are live:

Client Name:  
Contact Name:  
Contact Phone Number:  
Been a Client Since:  
Modules that are live:

## City of Bloomington, Indiana ERP Request for Proposals

### **L. Total Cost (See Appendix C / Total Cost Summary)**

Costs for the Vendor's proposed solution should be submitted as outlined in this RFP. Costs should include the complete costs for the proposed solution. Use additional pages as needed to provide additional cost detail.

No additional charges, other than those listed on the price breakdown sheets, shall be made. All shipping and insurance costs to and from the site shall be included in this proposal. All payments to shipping agents and for insurance fees shall be made directly by the Vendor. Vendor shall be responsible for all arrangements for the shipment of equipment / software to the City's prepared site. Specific payment terms will be negotiated as part of the final contract. It is expected that certain payments will be made upon delivery of the software with additional payments made based on specific project milestones. Client may during the implementation period or thereafter require modifications, interfaces, conversion or other services from Vendor. Vendor agrees to provide a written Change Order describing the work to be performed and estimating the costs, including expenses, for Client approval before any work is initiated by Vendor. Vendor will not exceed the costs set forth in the mutually agreed to Change Orders without justification, in writing, that is acceptable to the Client.

### **M. Proposal Signature Form**

The undersigned, as proposal responder, declares that he/she has carefully examined all the items of the Specifications and Instructions herein that he/she fully understands and accepts the requirements of the same, and he/she agrees to furnish the specified items and will accept, in full payment therefore, the amount specified below.

Proposals shall include installation services, and the successful respondent shall obtain all required permits and pay fees required.

Note: terms are firm for 90 days.

Total Price           \$ \_\_\_\_\_

Firm Name:           \_\_\_\_\_

Date:                   \_\_\_\_\_

Address:             \_\_\_\_\_  
\_\_\_\_\_

Telephone:           \_\_\_\_\_

Signature:           \_\_\_\_\_  
(Person executing response & official capacity)

## City of Bloomington, Indiana ERP Request for Proposals

### APPENDIX A – INSURANCE AND PERFORMANCE BOND REQUIREMENTS

#### SECTION W Proposer / Vendor Insurance

##### W-1: General

(A) During the term of any contract for service, the vendor entering into the contract agrees to provide evidence of insurance in the amounts stated. These requirements can only be amended by the Mayor based on recommendation from Risk Management.

(B) All references in this Section to the City refer to the City of Bloomington, Indiana, a political subdivision of the State of Indiana.

(C) Risk Management shall have the right to represent the City, its officials, employees, and volunteers in all matters relating to this Section. S/He shall provide information, assistance, and recommendations to the Mayor in the administration of insurance requirements imposed under this Section.

##### W-2: Insurance Requirements

(A) No contract for services shall be awarded by the City to any person until that person shall assure; by affidavit, that all the contractors and subcontractors employed, or that will be employed under the provisions of the contract; shall be in compliance with Indiana requirements for worker's compensation insurance, and all other legal regulations, and unemployment insurance.

(B) If deemed necessary by the City, the vendor entering into a contract for service agrees to maintain continuous professional liability coverage written on an occurrence basis or, if on a claims made basis, with an extended coverage provision of not less than three years. Coverage will be provided through insurance companies licensed to do business in the state of Indiana with the Best Rating of A- or better (or an equivalent rating via Fitch or Standard & Poors at the discretion of the City)

(C) Professional liability coverage shall be provided in the following minimum amounts:

1. Projects up to \$10,000,000:  
\$1,000,000 per claim and  
\$1,000,000 per annual aggregate
2. Projects in excess of \$10,000,000:  
\$1,000,000 per claim and  
\$2,000,000 per annual aggregate

(D) The vendor entering into a contract for service shall maintain all other insurance requirements in accordance with the following:

- (1) The insurance required shall be written for not less than the following:
  - (a) Worker's Compensation:
    1. State Statutory
    2. Applicable Federal Statutory

## City of Bloomington, Indiana ERP Request for Proposals

- |   |             |
|---|-------------|
| 3. Employer's Liability-Each Accident - | \$ 500,000  |
| Disease-Policy Limit -                  | \$1,000,000 |
| Disease-Each Employee-                  | \$ 500,000  |
- (b) Comprehensive or Commercial General Liability (including Premises-Operations, Independent Contractor's Production, Product Liability and Completed Operations, and Broad Form Property Damage):
- |   |             |
|---|-------------|
| 1. General Aggregate<br>(except Products-Completed Operations)  | \$1,000,000 |
| 2. Products-Completed Operations Aggregate  | \$1,000,000 |
| 3. Personal/Advertising Injury<br>(per Person/Organization)   | \$1,000,000 |
| 4. Each Occurrence<br>(Bodily Injury and Property Damage)   | \$1,000,000 |
| 5. Limit per Person Medical Expense   | \$ 5,000    |
| 6. Exclusions of Property in Contractors Care,<br>Custody or Control will be eliminated                             |             |
| 7. Property Damage Liability Insurance will<br>provide coverage for Explosion, Collapse, and<br>Underground Damage. |             |
- (c) Contractual Liability:
- |                                     |             |
|-------------------------------------|-------------|
| 1. General Aggregate                | \$1,000,000 |
| 2. Each Occurrence                  |             |
| (Bodily Injury and Property Damage) | \$1,000,000 |
- (d) Automobile Liability:
- |                    |                           |
|--------------------|---------------------------|
| 1. Bodily Injury   | \$ 500,000 each Person    |
|                    | \$1,000,000 each Accident |
| 2. Property Damage | \$ 500,000 each Accident  |
- (e) Excess Liability Umbrella Form:
- |                      |             |
|----------------------|-------------|
| 1. General Aggregate | \$1,000,000 |
| 2. Each Occurrence   | \$1,000,000 |
- (2) The following policies are to contain, or be endorsed to contain the following provisions:
- Commercial General Liability, Contractual Liability and Automobile Liability Coverage:
- (a) The City, its officers, employees, and volunteers are to be covered as insured as respects: liability arising out of activities performed by, or on behalf of, the vendor entering into a contract for service including the insured's general

## City of Bloomington, Indiana ERP Request for Proposals

supervision of the premises owned, occupied, or used by the vendor entering into a contract for service, or automobiles owned, leased, hired, or borrowed by the vendor entering into a contract for service. The coverage shall contain no special limitations on the scope of protection afforded to the City, its officers, employees, and volunteers.

- (b) The vendor, entering into a contract for service: insurance coverage shall be primary insurance as respects the City, its officers, employees, and volunteers. Any insurance or self-insurance maintained by the City, its officers, employees, and volunteers shall be excess of the vendor entering into a contract for service's insurance and shall not contribute to it.
- (c) Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the City, its officers, employees, and volunteers.
- (d) Coverage is to be written on an occurrence basis through an insurance company, or companies, lawfully authorized to do business in the State of Indiana with a Best rating of no less than A- (or an equivalent rating rating via Fitch or Standard & Poors at the discretion of the City).
- (e) The vendor entering into a contract for service agrees to hold harmless and indemnify the City, its officers, employees, and volunteers for all liability arising out of the contract, except that arising out of the sole negligence of the City.

### Property Insurance:

- (a) All insurance will be written through an admitted insurance company or companies lawfully authorized to do business in the State of Indiana with a Best's rating of no less than A-.

### All Coverage:

- (a) Each insurance policy required shall be endorsed to state that coverage shall not be suspended, voided, canceled, reduced in coverage or in limits except after a thirty (30) day prior written notice by certified mail, return receipt requested, has been given to the City.
- (b) Any deductibles or self-insured retention should be declared to, and approved by, the City.
- (c) The vendor entering into a contract for service shall furnish the City with certificates of insurance and with original endorsements effecting coverage required by these insurance requirements. The certificates and endorsements are to be signed by any person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the City before work commences. The City reserves the right to require complete, certified copies of all required insurance policies at any time.
- (d) The vendor entering into a contract for service shall include all subcontractors as insured under its policies or shall furnish separate certificates of insurance and

## **City of Bloomington, Indiana ERP Request for Proposals**

endorsements for each subcontractor. All coverage for subcontractors shall be subject to all of the requirements stated in this Section.

### **W-3: Performance and Payment Bond**

- (A) The Contractor shall be required to furnish a performance bond and a payment bond each in the amount of the contract price insuring the faithful performance of the contract and payment of all obligations arising there under pursuant to Indiana Statutes.

**City of Bloomington, Indiana ERP Request for Proposals**

**Appendix B – EXCEPTION FORM**

Section #	Explanation



## **City of Bloomington, Indiana ERP Request for Proposals**

### **Appendix C – TOTAL COST SUMMARY**

The total cost summary should be on a separate attached sheet and must include the following breakdowns:

- Software Licensing Costs (show breakdown by module and by user type, if relevant).
- Project Management Costs.
- Data Conversion Costs.
- Implementation Costs.
- Training Costs
- Annual Maintenance Costs (show breakdown by module).
- Sales Tax should be listed as a separate line-item.

## **City of Bloomington, Indiana ERP Request for Proposals**

### **Appendix D – COMPREHENSIVE FUNCTIONAL CHECKLIST**

The functional checklist is available at <http://bloomington.in.gov/rfp> for download. It should not be returned in print form, we request only a digital submission of this spreadsheet.